

provoked
insights

Skincare Trends
&
Consumer Buying Behaviors



Background & Objectives

Provoke Insights is a leader in research for branding, advertising, media, and content marketing strategies. To stay ahead of market trends, the company conducts a bi-annual study, delivering cutting-edge insights into shifting consumer behaviors across industries.

Now in its landmark tenth wave, this extensive study continues to uncover key trends in Americans' buying behaviors and attitudes toward AI's integration into shopping, including consumer receptivity and adoption.

For this wave, Provoke Insights developed 15 industry-specific reports—this deck provides an in-depth look at the skincare industry.

Methodology

Provoke Insights conducted a 15-minute online survey among 1,500 Americans aged 21 to 65 in March 2025.

To ensure a representative sample of the U.S. population, Census data was used to guide a random stratified sampling approach, balancing key demographics such as household income, age, gender, geography, ethnicity, and presence of children in the household.

With this sample size, the results have a maximum margin of error of $\pm 2.5\%$ at a 95% confidence level.

Statistical significance testing was conducted at the 95% confidence level, with differences between subgroups highlighted in callout boxes within the graphs.



Key Findings



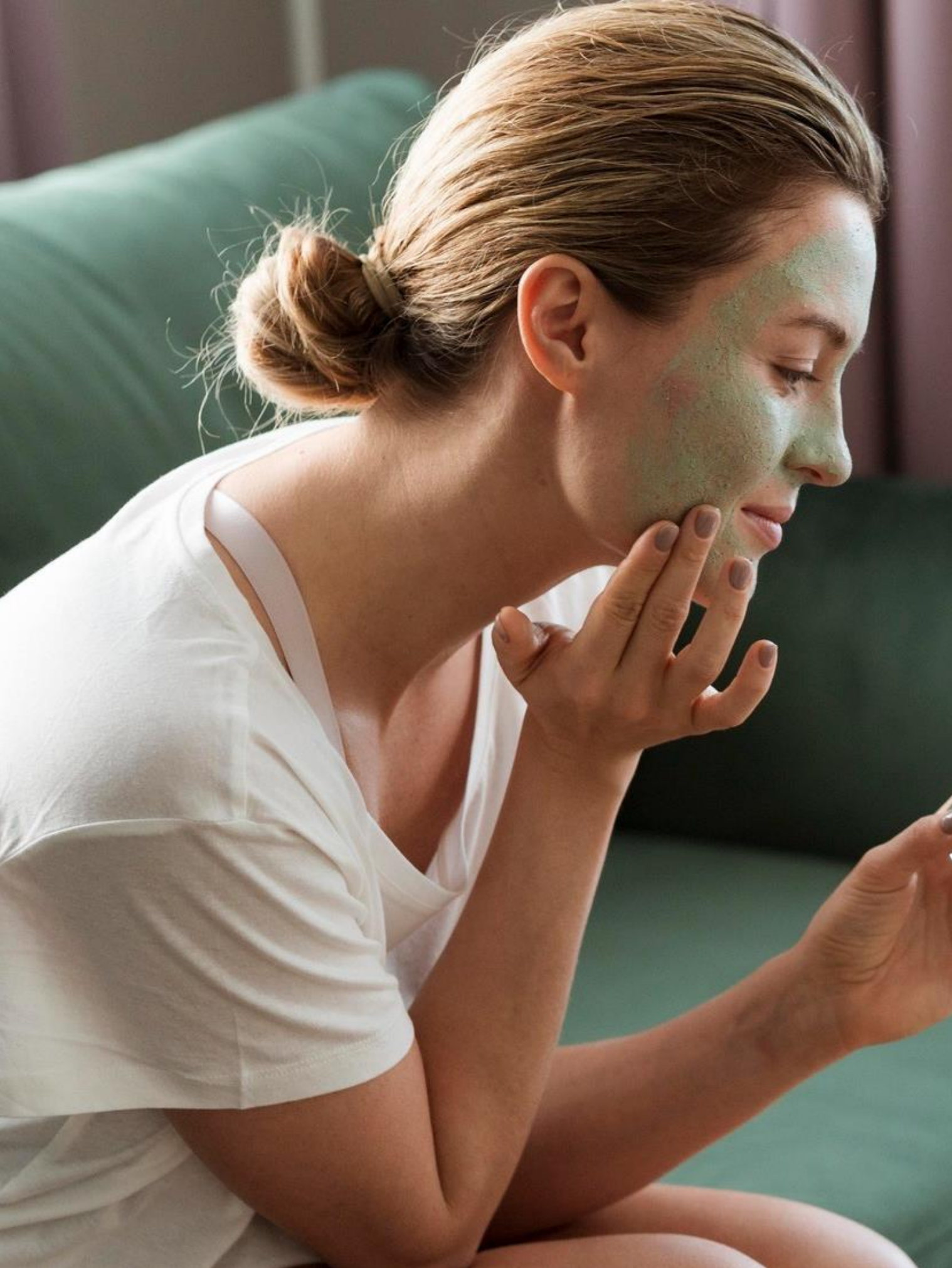
Seasonal Shifts & the Target Audience

Skincare purchases see a seasonal shift, with the highest frequency occurring in the spring months. However, this year's increase in sales is slightly lower than in previous years, signaling a potential slowdown in the category's growth.

Gen Z leads all generations in skincare purchases, with 58% having bought a product in the last month. Parents and urban consumers also show higher purchase rates, indicating a strong correlation between lifestyle factors and skincare spending.

Brands should introduce targeted seasonal promotions in spring while finding ways to maintain consumer interest in off-peak months. Expanding marketing efforts to urban consumers and parents can further enhance engagement and sales.





The Role of Dermatological Beauty

Consumers strongly value dermatological beauty in their skincare routines, with 87% stating its importance. However, despite this widespread appreciation, only a fifth of skincare users are directly influenced by dermatologist recommendations when making purchases. Those with a daily skincare routine are significantly more likely to consider professional endorsements, highlighting a divide between general interest and direct impact on buying behavior.

When selecting products, consumers prioritize skin health, price, and ingredients over dermatologist recommendations, indicating that credibility is built more through perceived effectiveness than expert backing.

Brands should emphasize product formulations that deliver visible results while maintaining competitive pricing. Integrating dermatologist insights into broader messaging—such as ingredient education—rather than relying solely on endorsements can create a stronger connection with skincare shoppers.

The Growing Role of AI in Skincare Shopping

Artificial intelligence is emerging as a powerful tool in skincare shopping, with nearly two-thirds of recent buyers expressing interest in AI-powered recommendations. Younger consumers, parents, and high-income shoppers are the most receptive to AI-driven shopping tools, while older and rural consumers remain skeptical.

Despite this interest, AI recommendations are not yet fully trusted, and many consumers desire improvements in personalization and usability.

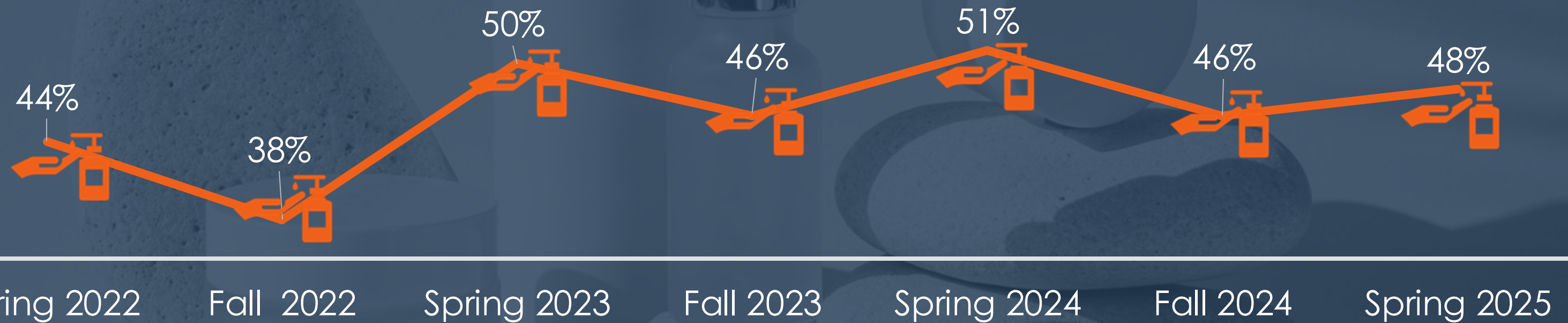
Brands should refine AI tools to provide hyper-personalized recommendations and seamless in-store integration to increase adoption. Educating consumers about AI's ability to enhance product selection and comparison can also help bridge the trust gap and encourage broader usage.

Skincare Trends



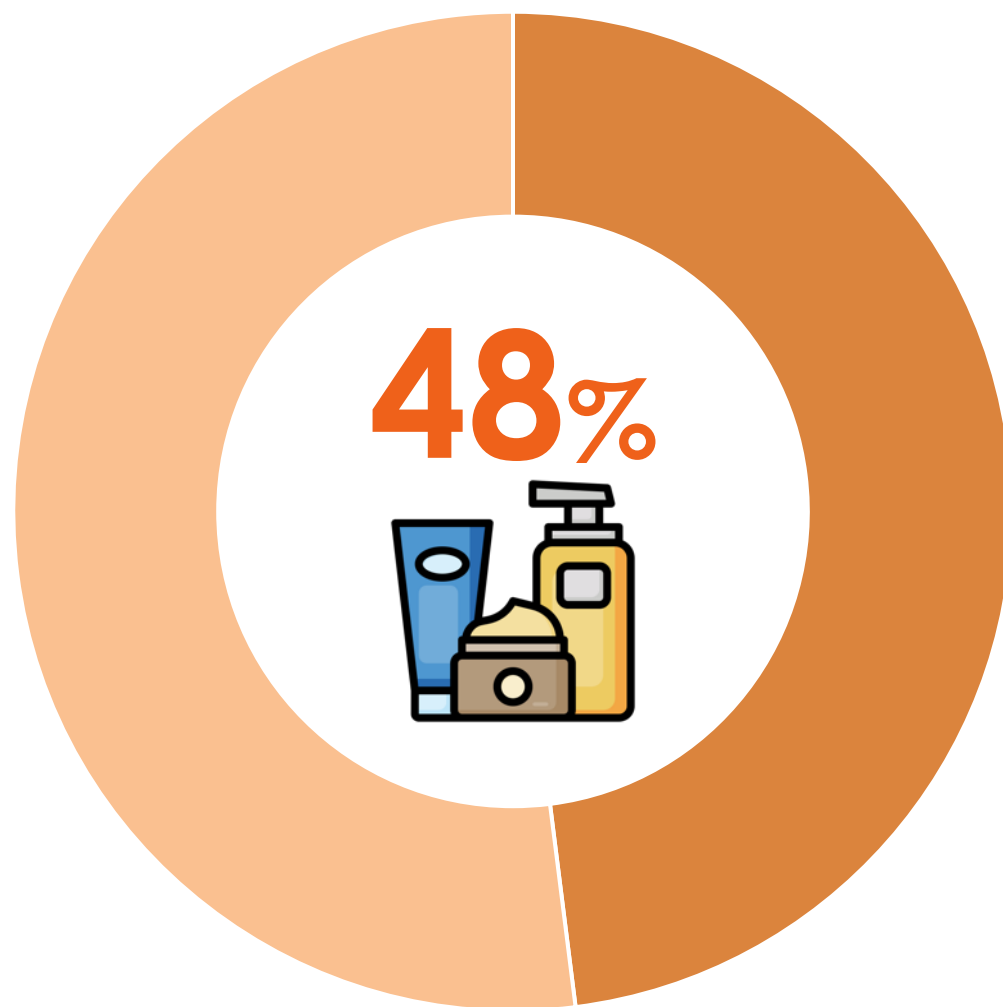
Skincare Purchases Decrease in the Fall

Skincare items are often purchased more frequently in the spring months. However, currently the increase in sales is slightly lower than in previous years.



Although they are the youngest cohort, Gen Z buys skincare products more frequently than any other age group.

Purchased Skincare in the Last Month



Who is Significantly More Likely to Purchase Skincare

♀ Women (59%)

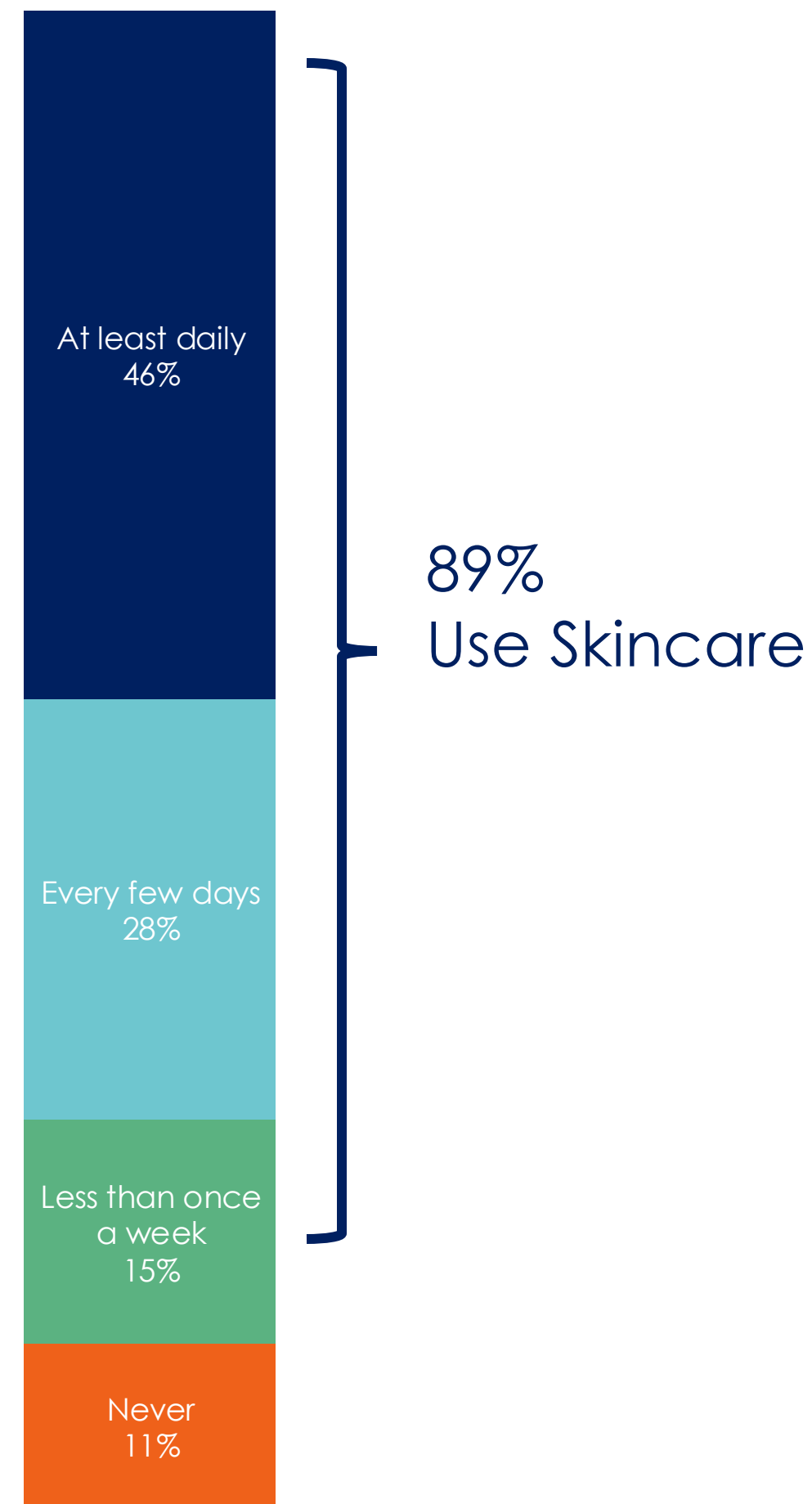
Z Gen Z (58%)

👤 Parents (56%)

🏙️ Urban (54%)

Frequency of Skincare Product Usage

The majority of Americans use skincare products, with nearly half using them daily.





46%
Uses Skincare
Products Daily

While Gen Z may be more likely to buy skincare products, Gen X women most often have a daily skincare routine.

Groups Significantly More
Likely to Be Daily Skincare Users



Females (61%)



Income \$150K+ (58%)



Asian (55%)

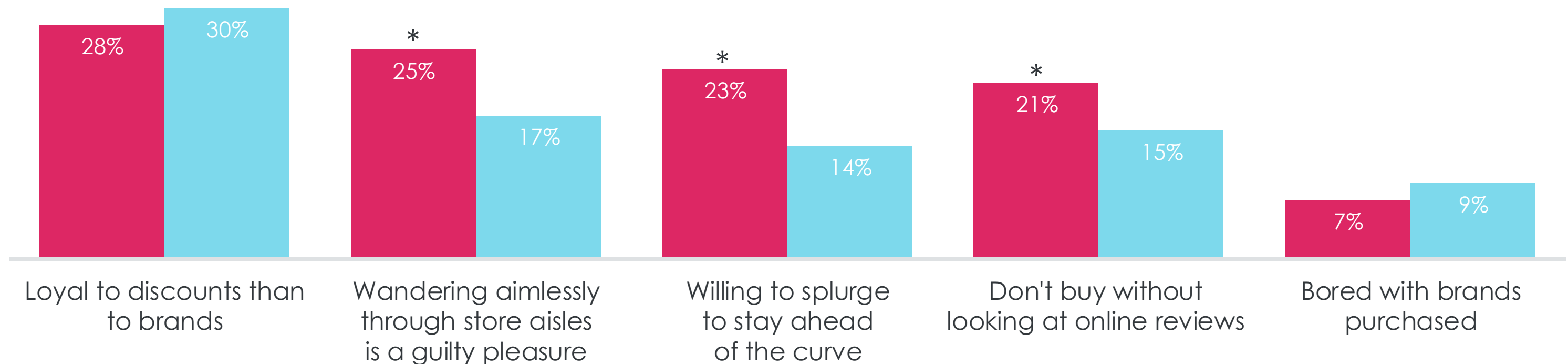


Gen X (51%)

Skincare Shopper Habits

Recent buyers of skincare products enjoy exploring stores and are more willing to splurge to stay ahead of trends. Reading reviews has become a critical part of the skincare purchase process.

Top 2 on a 7-Point Agree Scale



■ Skincare Products Purchasers (n=723) ■ Did not Purchase (n=777)

*indicates significant differences

Q. How much do you agree or disagree with the following statements?

Shopping Activities in the Last Month

Loyalty programs and visiting social influencer's shopping page are activities that recent skincare buyers participated in.

	Purchased Skincare Products in the Last Month (n=723)	Did Not Purchase (n=777)
Joined loyalty or membership program	31%	18%
Visited a social influencer's shopping page	31%	15%
Entered a sweepstake	26%	25%
Shared or commented on a branded social media campaign	24%	11%
Joined an online brand event	16%	7%
Participated in a referral program	16%	9%
Attended an in-person brand event	13%	8%
Acted as a social influencer	7%	3%

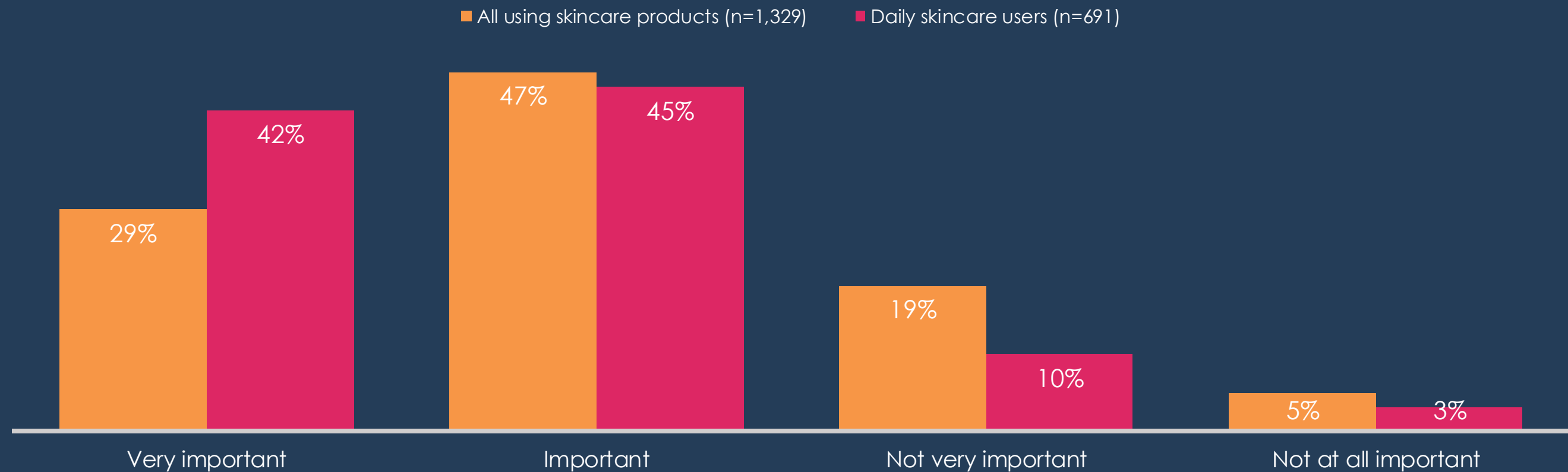


A photograph of two women against a solid green background. The woman on the left has dark hair and is applying a white cream to her cheek with a brush. The woman on the right has dark curly hair and is applying a grey mask to her face. A dark blue banner with white text is overlaid on the left side of the image.

Attitudes on Dermocosmetics

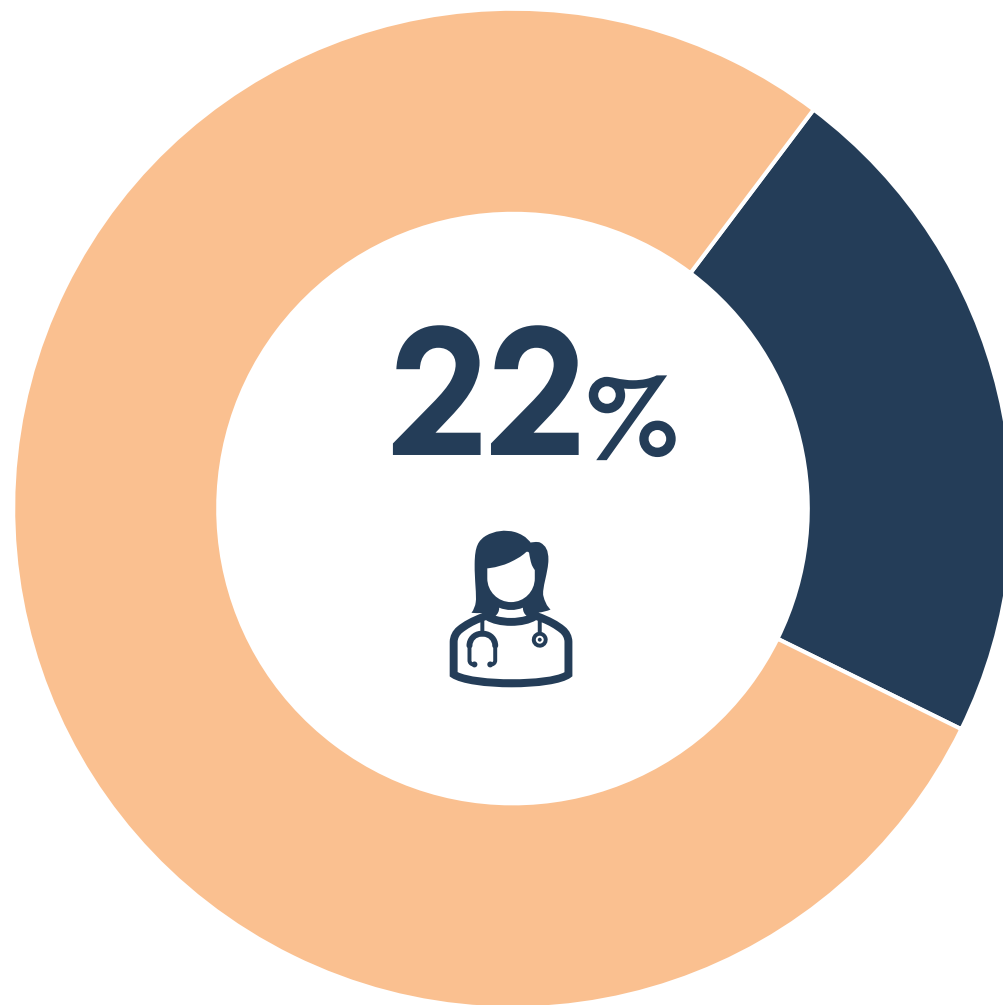
Importance of Dermatological Beauty in Personal Care Routine

People with a daily skincare routine understand the importance of skincare for overall beauty.



Recommendations from dermatologists are more likely to influence individuals who are committed to their daily skincare routine.

Influenced A Lot by Dermatologist Recommendations



Groups Significantly More Likely to be Influenced by Dermatologist Recommendations

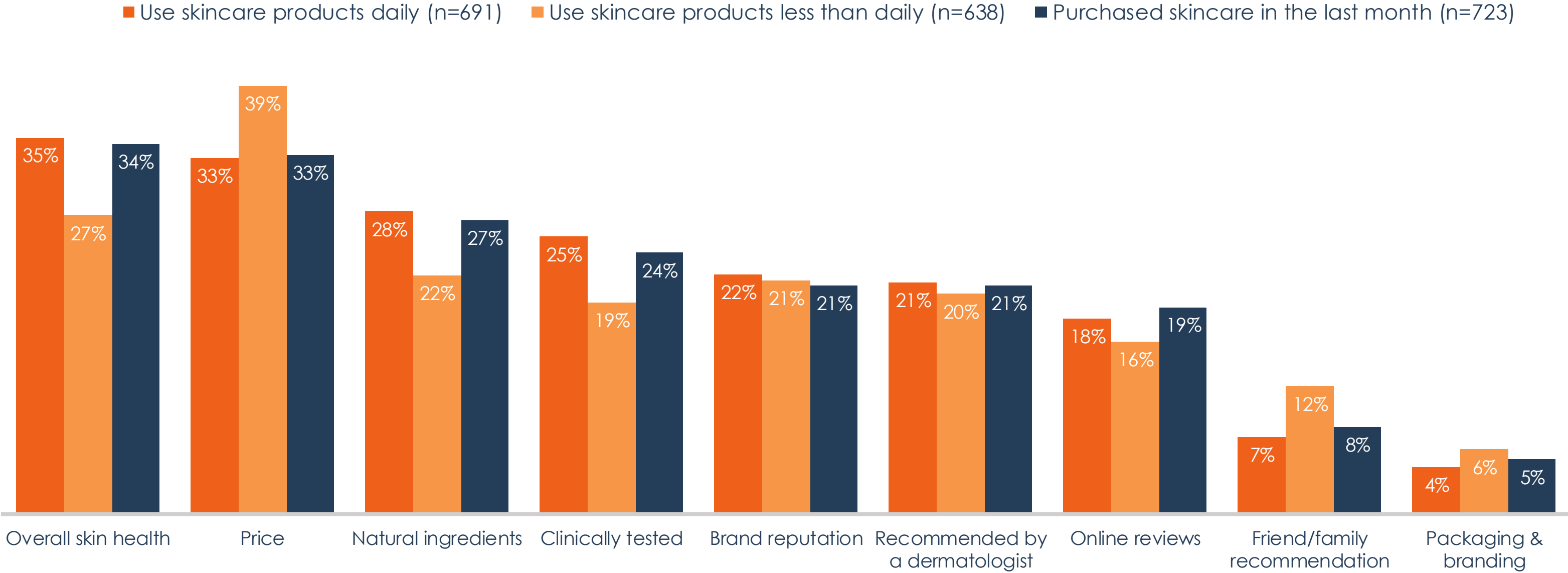
30% Daily Skincare Routine

28% Urban

27% Purchased Skincare Products in the Last Month

Most Important Dermocosmetic Factors

Skin health is the primary factor for daily skincare users when selecting a product, followed by price as a secondary consideration. A dermatologist's recommendation is sixth in priority.

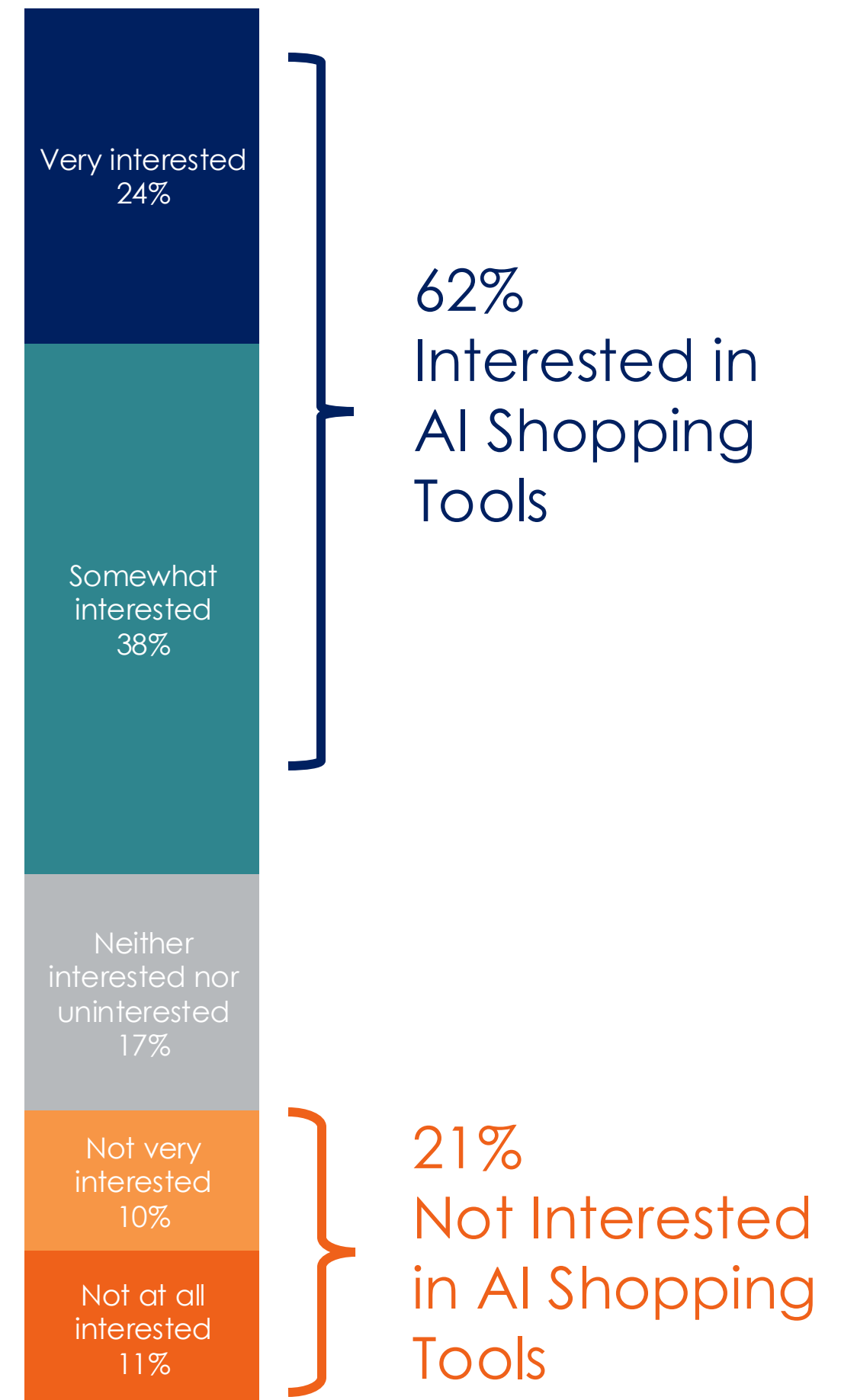




How AI is Shaping Skincare Shopping Trends

Interest in AI Shopping Tools Among Skincare Purchasers

Almost two-thirds of recent skincare purchasers are interested in using AI shopping tools.



What Do these Skincare Shoppers Look Like?

Interested in AI Shopping Tools

Overall 62%

- Parents (75%)
- Urban (71%)
- Males (72%)
- Millennials (70%)
- \$150K+ HHI (69%)

NOT Interested in AI Shopping Tools

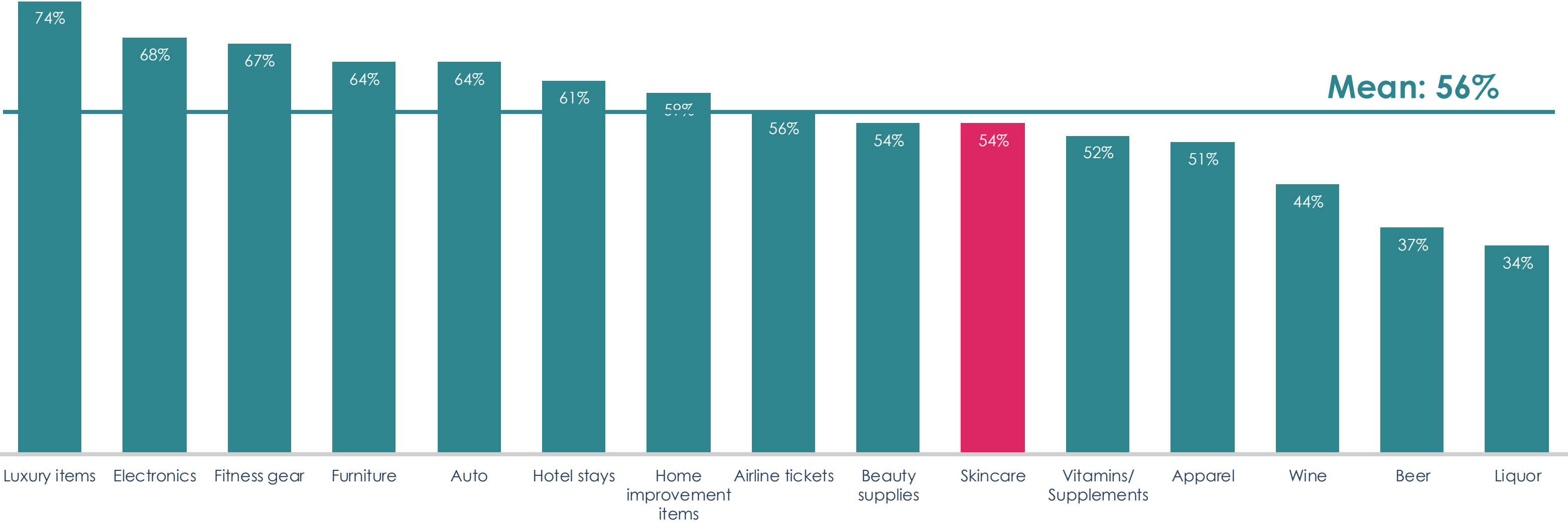
Overall 21%

- Boomers (31%)
- Rural (29%)
- Not Parents (29%)
- Females (26%)

AI Helpfulness While Shopping

Consumers show a strong interest in AI technology to assist with skincare purchases, but at present, it is perceived as less helpful than it could be.

AI Helpfulness
Top 2 box on a 5-point helpfulness scale



AI Trustworthiness

While it may be helpful to use AI tools for skincare purchases, the trust with the technology is not there yet.

Categories	AI Trust Ranking
Electronics	1
Apparel	2
Travel	3
Home Improvement	4
Auto	5
Beauty/Skincare	6
Furniture	7
Fitness gear	8
Vitamins/supplements	9
Luxury items	10
Alcohol	11

AI Shopping Tools: Improvement Opportunities

Enhancing tailored experiences and speeding up the shopping process are key areas for enhancing AI shopping tools. Additionally, some users mention a desire for AI shopping tools to assist with the in-store experience.

Tailored Experience

"It tailors recommendations to your tastes and preferences"

"Personalized recommendations can make my shopping experiences more appealing to me"

"More personalized options for me as a consumer"

"I would like it if the AI could curate products, ratings, prices and locations on a comparison basis to ease and speed up the research process."

Convenience & Cost

"If it saved me time and more importantly money"

"The ability to order and pay for groceries that I need and want when it's time to get groceries."

"It would help me make purchasing decisions faster."

"Finding the cheapest and best option for what I'm looking for and creating a list."

"I do really hate to shop. If AI could do the shopping for me that would make me happy."

"If they could find discounts and deals."

User Interface and Usability

"A clean, intuitive design that makes navigation effortless can significantly improve the shopping experience. Simplicity and accessibility are key."

"Virtual try-ons or augmented reality simulations of how a product might work for me."

"A perfect AI model that you can adjust the body size to a person's exact body measurements to try on an outfit."

"It needs to be more seamless. Right now, it feels like a separate feature instead of a core experience."

"The AI voices are too digitized. They would need to be more lifelike."

In-Store Experience

"I would love an AI shopping experience that helps me find things in the store."

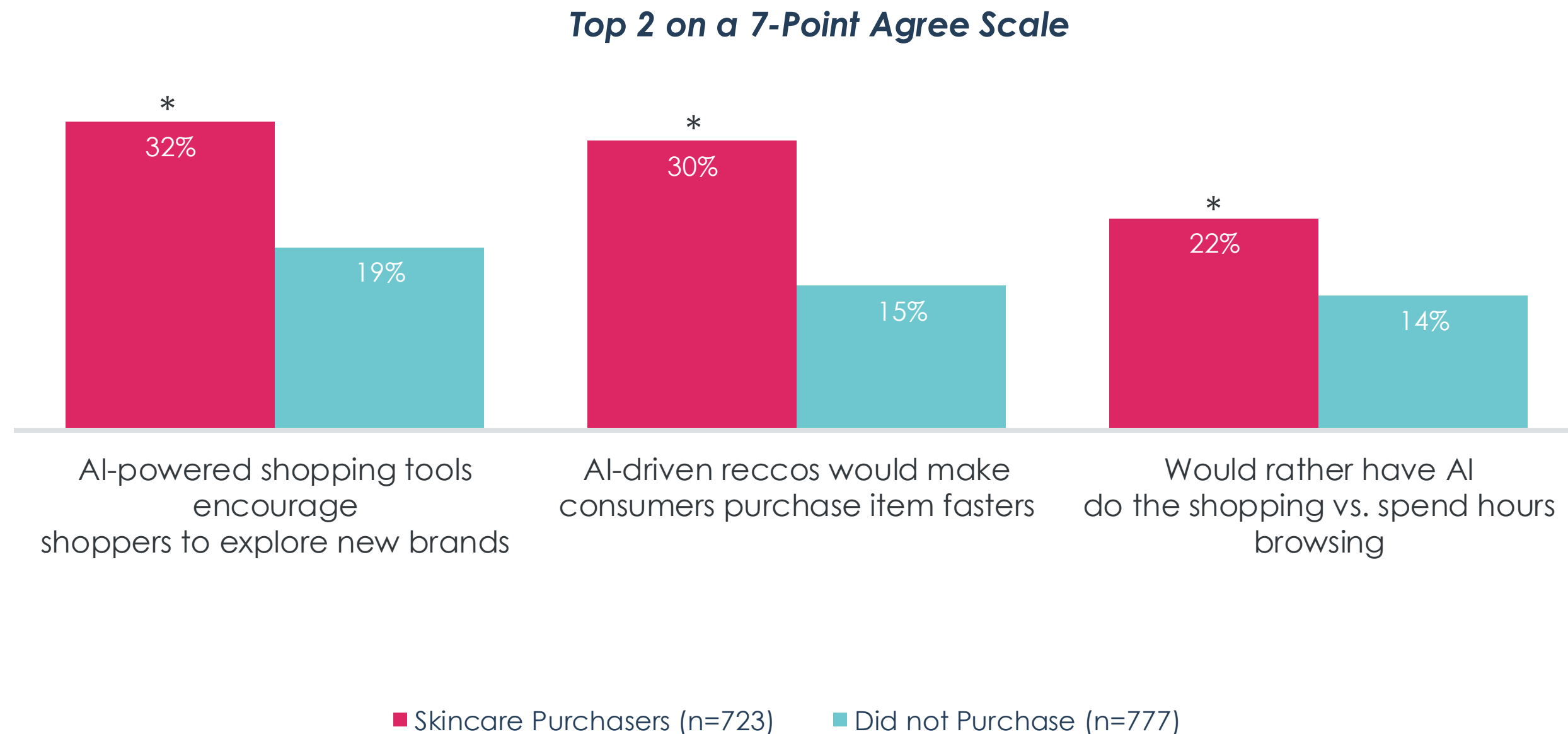
"Just knowing if the items I want are available in store."

"I hate browsing in stores. AI help would make shopping faster and easier."

"I genuinely like shopping. I would like AI to help find items in the store, comparing brands to each other to see which has better ingredients, and recommendations based on past purchases."

Skincare Shopper Habits Concerning AI

AI is seen as a way to expedite the overall shopping process for skincare products while also informing consumers about new products.



*indicates significant differences

Q. How much do you agree or disagree with the following statements? (Select one for each statement)

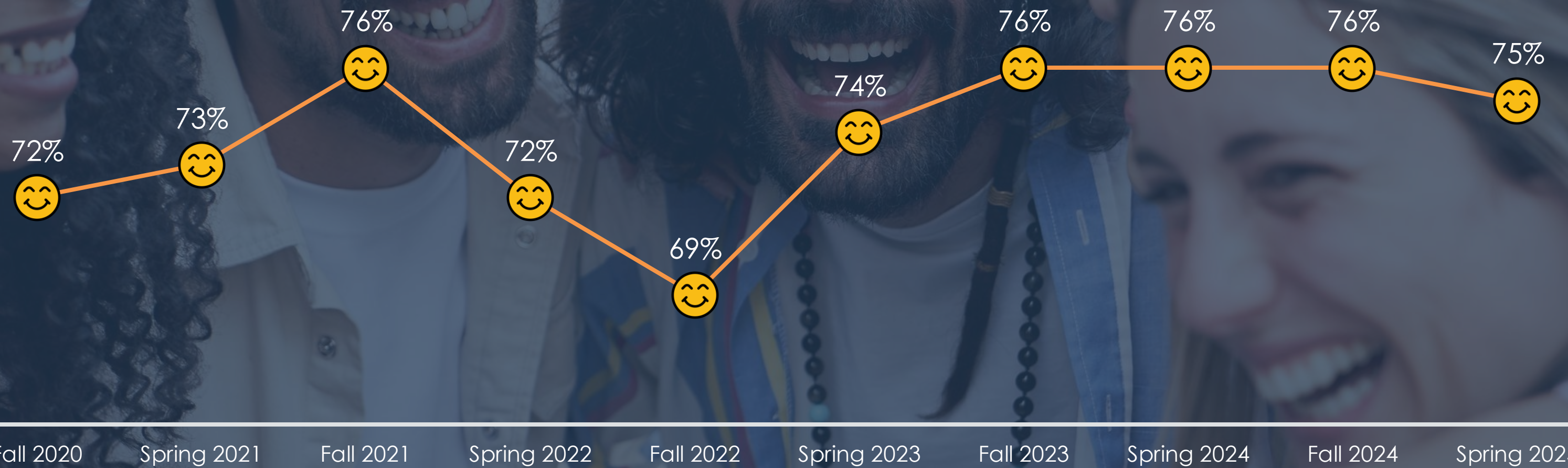
Optimism & Concerns



Consumer Optimism

Overall, Americans remain positive about the future.

Optimism
Top 2 box on a 4-point scale



Why are Americans Optimistic? (75% of total responses)

Americans who are hopeful about the future point to the current administration as a major factor behind their optimism. Additionally, belief that financial stability, possibility of tech advances, and personal plus familial health also adds to their positive outlook.

Political and Economic Reasons

"The new administration has brought changes that have improved my living situation."

"I believe the economy will improve under the current leadership."

"The economy seems to be improving, and the efforts are being made to cut federal expenses to reduce national debt."

Financial Stability

"My job is secure and high paying"

"I believe I will be financially very stable in coming years"

"I got a raise recently"

"I have added a new exciting business picture with my existing business model and it will be very profitable."

"I am three years away from retirement and have worked to save for it."

Family and Personal Wellbeing

"I have a wonderful family and friends that are supporting. I have a career I love and my husband is very successful. We also have a nice sum for retirement."

"Seeing my grandchildren grow makes me keeping going."

"We are planning to move out of state and purchase a home."

"I have a good family, good wife, I have new born baby 8 months old. I am trying to make better life for my son and its actually make me optimistic."

"I have God in my life, a beautiful marriage and kids and all my needs are met."

Advancing Technology

"The possibility of AI to drive growth and innovation"

"I'm optimistic about the future because technology keeps improving daily, making life easier and more connected worldwide."

"I am optimistic about the future mainly because of the incredible advancements we're seeing in technology, sustainability, global cooperation, and new innovations in areas like renewable energy and more."

"Technology advancement will solve most problems in the future."

"Rapid progress in technology such as artificial intelligence"

Why are Americans Not Optimistic? (25% of total responses)

In the same vein, Americans who are pessimistic about the future also blame the current administration for their frustrations. Other contributing factors include concerns about financial instability, and climate change.

Governance Failures

"I am concerned about the direction of leadership in the country."

"I feel that the current policies are negatively impacting the country."

"There are unsettling developments in the government that contribute to uncertainty."

"I am concerned about policies that may negatively impact certain communities"

"The outcome of recent elections has made me less hopeful about the future."

"The government is scary. "

Financial Instability

"I am concerned about having enough financial resources for retirement."

"Inflation is reducing my purchasing power, and as a senior, I have limited opportunities to increase my income."

"Things are too expensive"

"Prices continue to increase while wages and income have remained relatively unchanged."

"Inflation and recent policy changes have created uncertainty about future affordability and financial stability."

Inflation shows no signs of stopping. Trump and Musk don't care what happens to the average citizen. I can't afford groceries or gasoline

Climate Concerns

"The increasing frequency of extreme weather events makes it hard to feel optimistic."

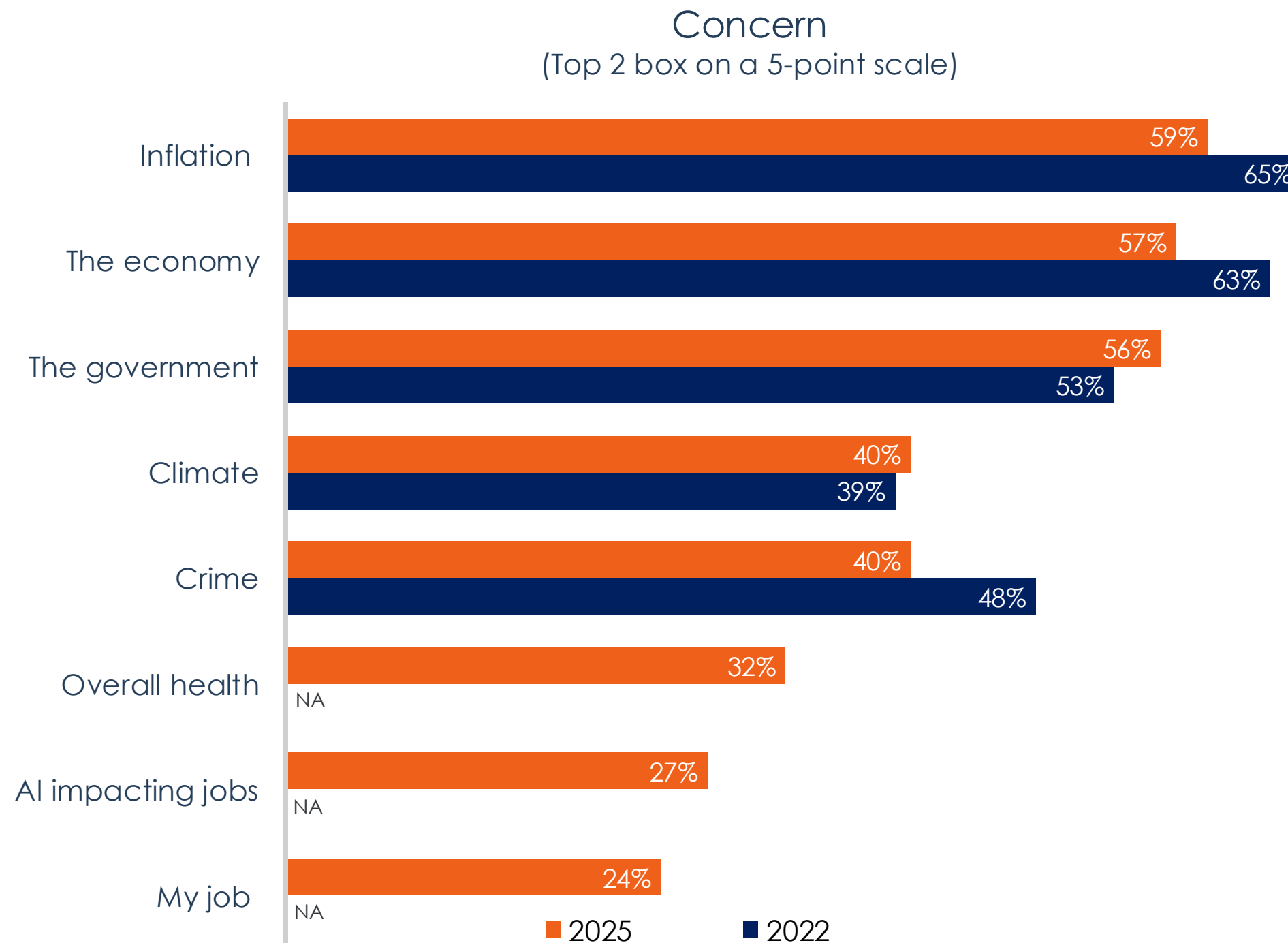
"There needs to be stronger action on climate change and there is little being done."

"I worry about the stability of the planet."

"The slow pace of climate action makes it difficult to believe meaningful changes will happen in time."

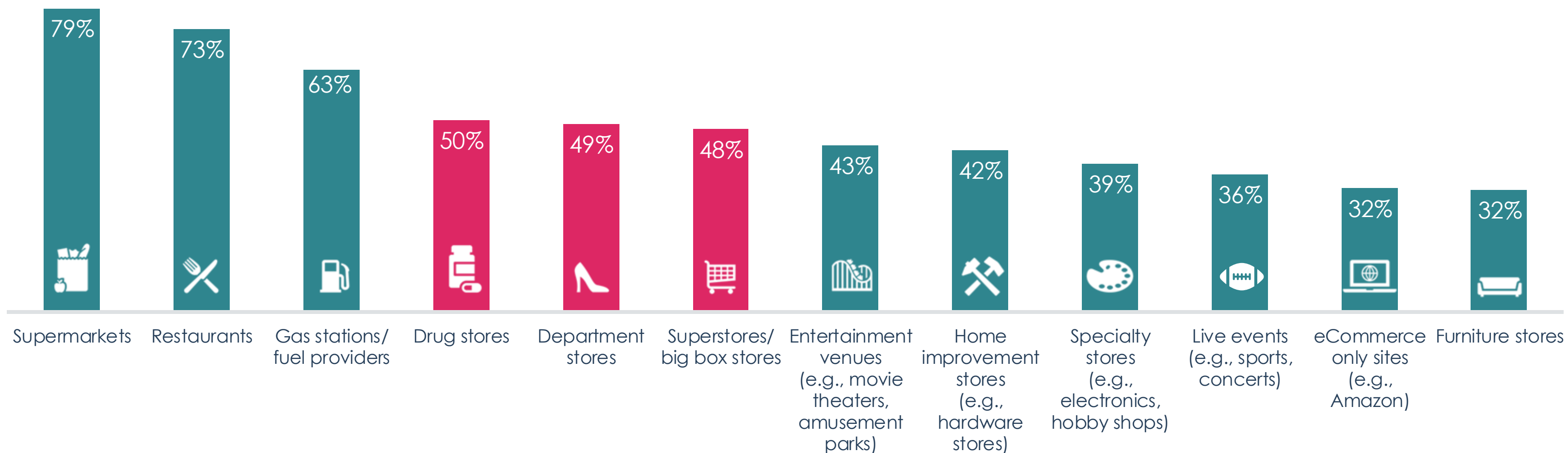
Top Concerns Impacting Consumers

Despite a decrease from three years ago, inflation and the economy continues to be the leading concern for Americans. Governmental concerns has risen since 2022, while crime has sharply declined.



Inflation Impact Across Different Types of Stores

While half of consumers have seen price increases at drug stores, department stores, and superstores, it is not as high as supermarkets and restaurants.

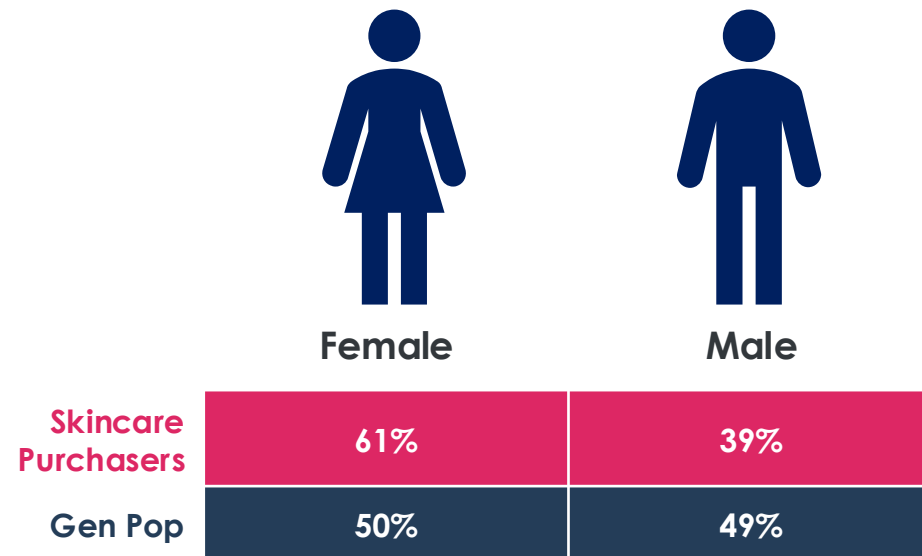


Skincare
Customer
Profile



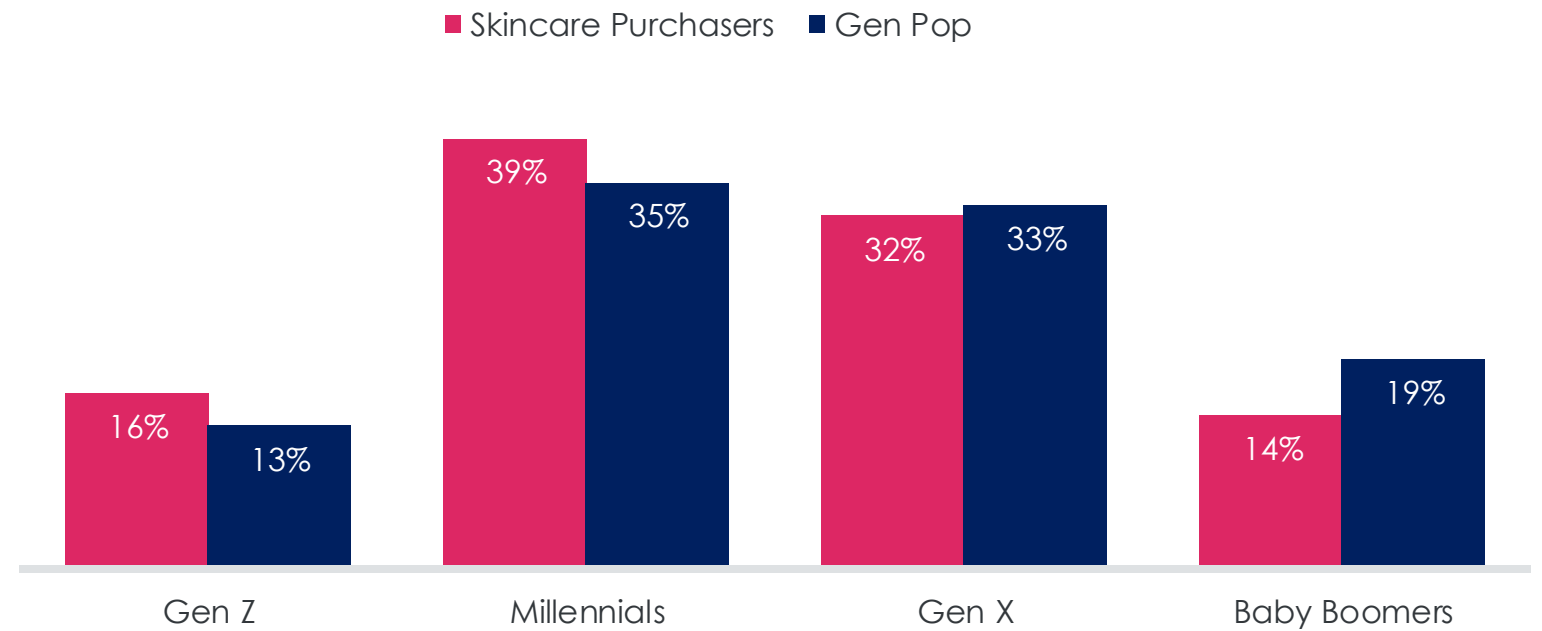
Respondent Profile

Gender

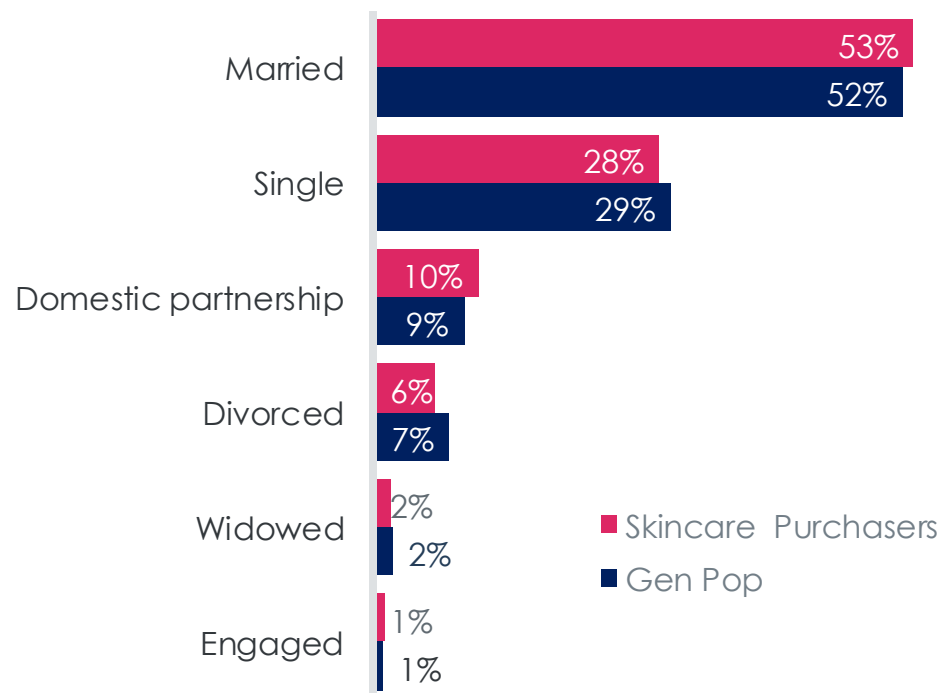


*<1% other identity

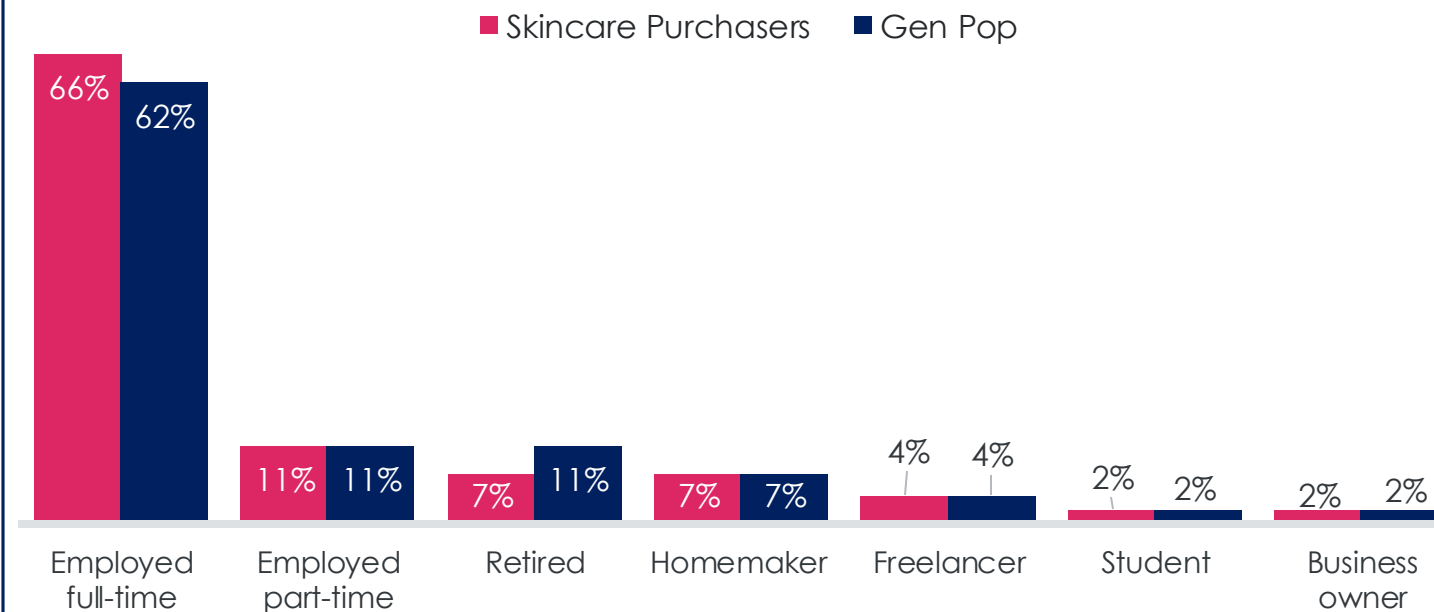
Generation



Civil Status



Employment Status

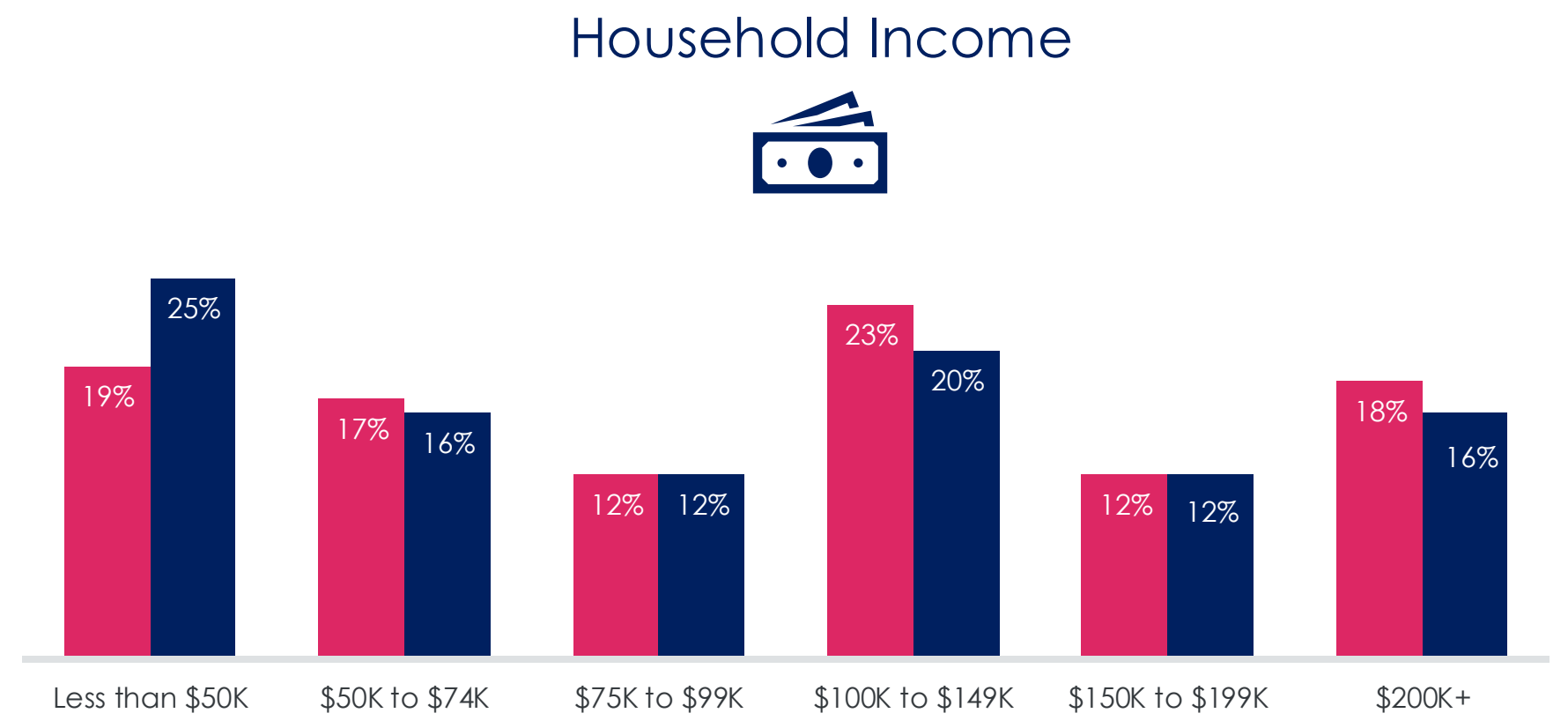
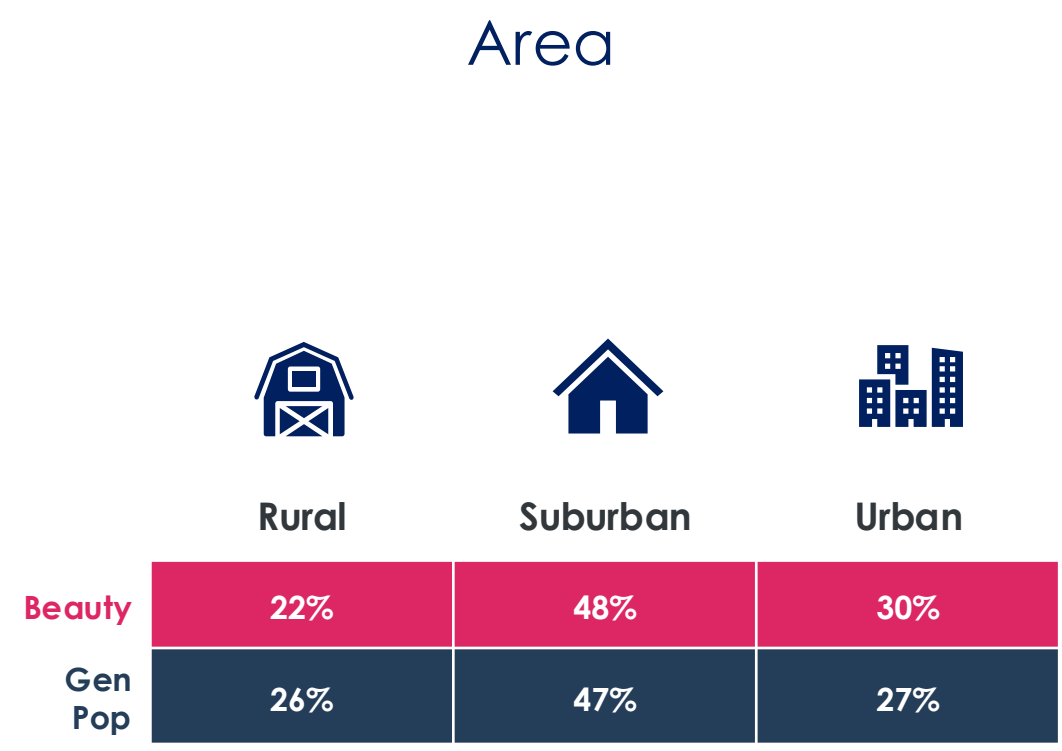
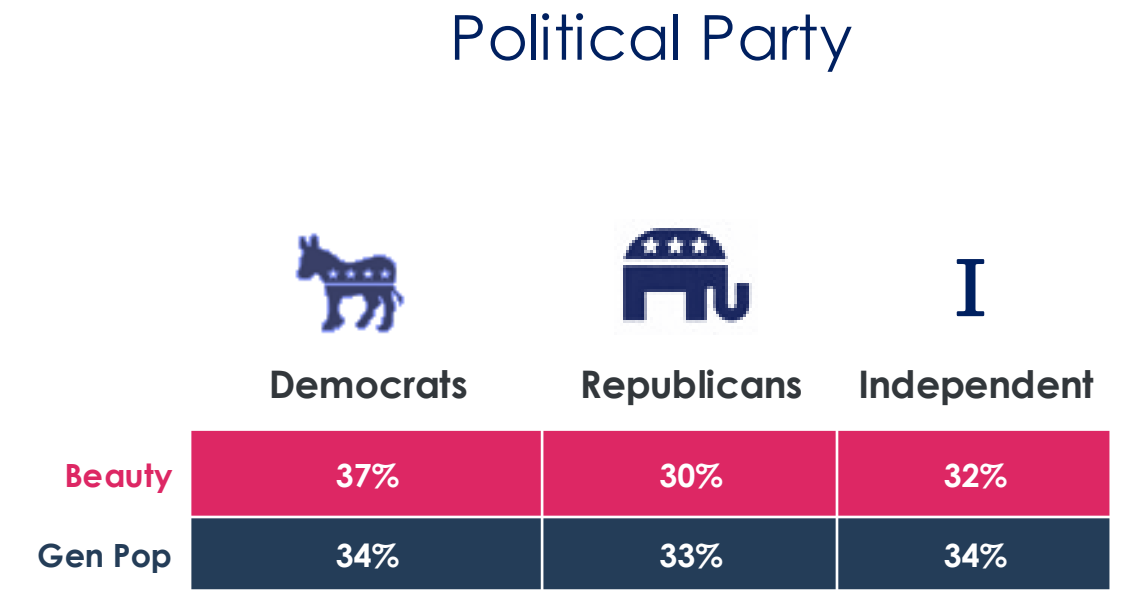
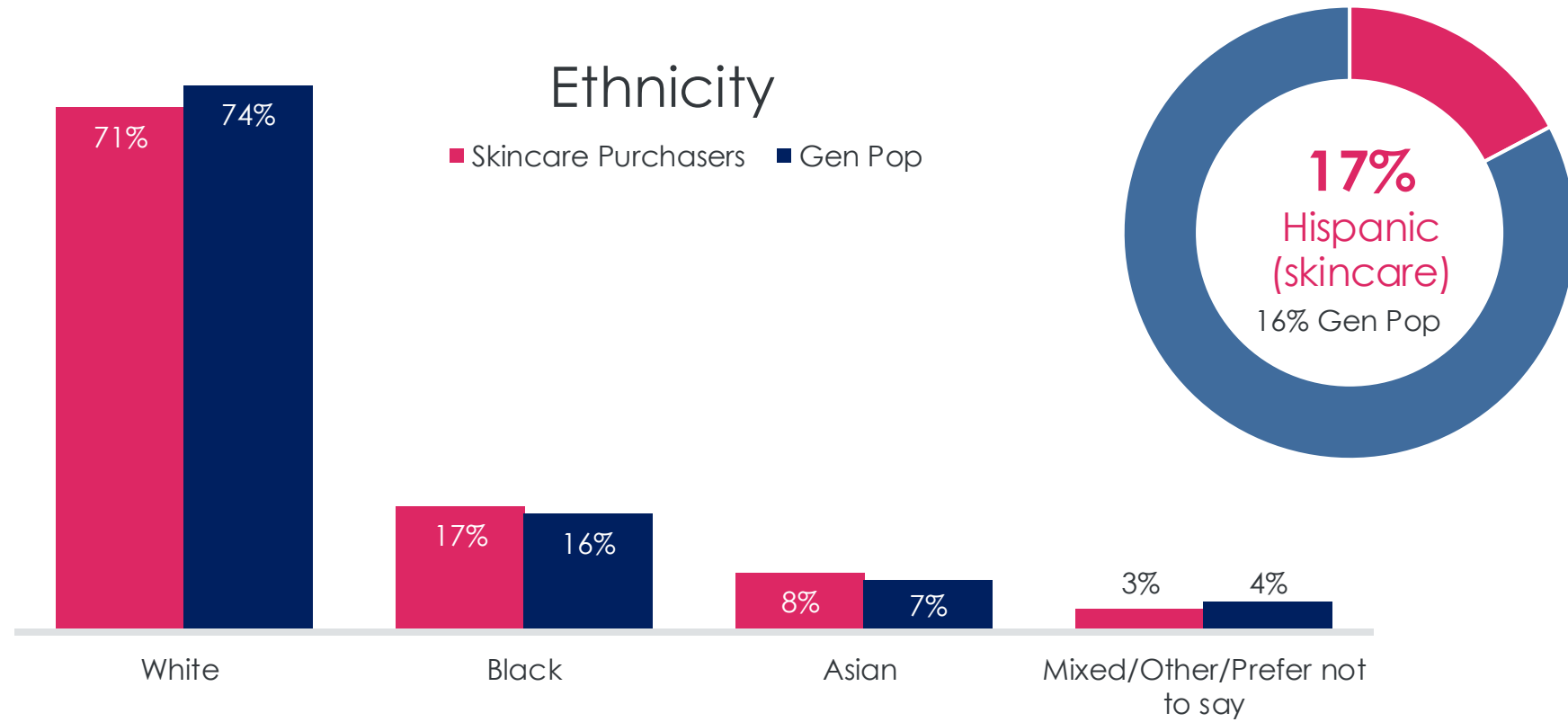


Parents of Children Under 18



45% Of Skincare Purchasers
39% Gen Pop

Respondent Profile



About Provoke Insights

Provoke Insights is not just a market research firm—we are a strategic partner dedicated to fueling brand growth. Our full-service approach is designed to go beyond data collection, providing deep, actionable insights that empower brands to make smarter marketing decisions.

What sets us apart? We specialize in branding and advertising research, blending cutting-edge methodologies with real-world marketing expertise. Our team is made up of seasoned researchers, brand strategists, and media experts, ensuring that every insight translates into impactful business strategies.

At Provoke Insights, we don't just deliver reports—we deliver a roadmap to success. Whether you're looking to sharpen your messaging, refine your target audience, or maximize ROI, we provide the research that drives measurable results.

Let's transform insights into action. Reach out to us at info@provokeinsights.com to learn more.

